### Overview of New Updates & Improvements to the LIHEAP Performance Management Website

LIHEAP Webinar hosted by the Office of Community Services (OCS) in the Administration for Children and Families (ACF) presented by APPRISE under contract to OCS

May 25th, 2021

Welcome:

Peter Edelman (OCS)

#### **Presenters:**

Dan Bausch (APPRISE)
Melissa Torgerson (Verve Associates)





### Welcome

#### Goals of This Webinar

- 1. Provide a brief overview of the purpose and history of the LIHEAP Performance Management Website.
- 2. Explain the review process conducted by the Performance Management Implementation Work Group.
- 3. Review the recent updates made to improve the website.
- 4. Present the basics for how grantees can effectively use the website.
- Demonstrate tools and resources for state LIHEAP grantee coordinators and staff.

#### Audience for This Webinar

State LIHEAP Coordinators, staff, and contractors.

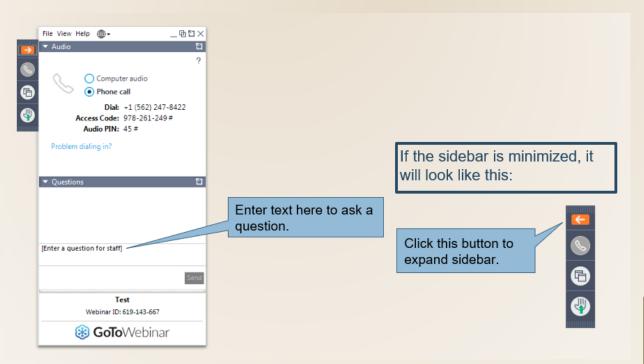
### **Webinar Overview**

- Structure of The Webinar
  - 60 minutes with slides and demonstrations.
  - Q&A break for questions.
  - Polls to help understand the audience and allow you to provide feedback.
  - Slides available for download now under "Handouts" in the GoToWebinar Sidebar.
  - The webinar is being recorded and will be published on the ACF YouTube channel.

### **GoToWebinar Question Box**

### Have a question?

- You are encouraged to ask questions as you have them by typing them into the GoToWebinar "Question" box.
- Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.



Presenter(s):
Dan Bausch

### **Audience Poll Question**

QUICKPOLL How familiar are you with the LIHEAP Performance Management Website and the resources available on that website? Please select one: Not Familiar at All **Not Too Familiar Somewhat Familiar** Very Familiar

## Purpose of the LIHEAP Performance Management Website



### **Main ACF LIHEAP Website**

- The primary federal LIHEAP website is the **ACF LIHEAP Website**.
- The ACF LIHEAP Website is the location where official communications, policy guidance, and reports are published and housed.
- The ACF LIHEAP Website includes resources for grantees on a variety of topics, including program administration and statutory LIHEAP requirements and regulations.
- The ACF LIHEAP Website is located at:
   https://www.acf.hhs.gov/ocs/low-income-home-energy-assistance-program-liheap

### LIHEAP Performance Management Website

- The LIHEAP Performance Management Website (PMW) is a special purpose federal website designed to focus on LIHEAP's Performance management initiative.
- The LIHEAP PMW is a distinct website that supplements the primary ACF LIHEAP Website.
- The LIHEAP PMW has three main purposes:
  - 1. Furnish grantees with Performance Management resources & information.
  - 2. Provide real-time, public access to LIHEAP program performance data.
  - 3. Facilitate Performance Management initiatives & collaboration.
- The LIHEAP PMW is located at: <a href="https://liheappm.acf.hhs.gov/">https://liheappm.acf.hhs.gov/</a>

## History of the LIHEAP Performance Management Website



### **Timeline**

- Initial Website The LIHEAP PMW was developed in 2014 and provided limited resources and data to grantees from 2014 to 2016.
- Public Launch The LIHEAP PMW was made available to the public in 2017.
- **Expansion** The LIHEAP PMW was expanded to include the Performance Measures data and new training resources during 2017 and 2018.
- PMIWG Review Beginning in 2018, the PMIWG conducted a review of the LIHEAP PMW and identified several key action items to improve the website.
- Website Renewal The Website underwent a review process as part of renewing the website's Authority to Operate (ATO). That renewal was approved in mid-2020.
- Website Updates and Redesign In early 2021, the LIHEAP PMW was updated to implement improvements specified by the PMIWG and HHS.

Presenter(s): Dan Bausch

### **Overview of Updates & Improvements**



## Update #1: New Website Design

### Why Changes were Needed

- The LIHEAP PMW was developed several years ago.
- The visual design varied across sections of the website.
- The website was not optimized for display on varying screen sizes.
- The PMIWG identified a need to reduce the amount of scrolling and page visits for grantees to find content they wanted.

#### What was Changed?

- 1. The appearance of the website was updated to improve and simplify the appearance.
- 2. A common website formatting/style approach was implemented across the website.
- 3. The website is now updated to optimize display based on screen or window size using responsive design.
- 4. Content is organized using an "accordion approach" with drop-down menus that open/close upon clicking.

Presenter(s): Dan Bausch

### **Old Version**

HOME PUBLICAT

PUBLICATIONS

**DATA WAREHOUSE** 

**GRANTEE RESOURCES** 

IMPORTANT LINKS

WHAT'S NEW?

HELP

Home » Important Links

#### **Important Links**

LIHEAP Glossary Site Feedback

This section of the LIHEAP Performance Management website contains links to other important online resources related to LIHEAP, including information on the history of LIHEAP, LIHEAP data collection forms, and organizations that conduct research related to LIHEAP.

HHS LIHEAP Website:

http://www.acf.hhs.gov/ocs/programs/liheap

- Statute and Regulations http://www.acf.hhs.gov/ocs/resource/liheap-statute-and-regulations
- Action Transmittals
   http://www.acf.hhs.gov/programs/ocs/resource/liheap-action-transmittals
- Information Memoranda http://www.acf.hhs.gov/programs/ocs/resource/liheap-information-memorandas
- HHS Information Memorandum Re: LIHEAP Performance Measures
   http://www.acf.hhs.gov/programs/ocs/resource/implementing-liheap-outcome...

Annual Household Report:

LIHEAP Household Report Short Form and Long Form for Federal Fiscal Year (FY) 2017, November 15, 2017
LIHEAP Household Report - Check Before You Submit Document

Annual Performance Data Form:

LIHEAP Performance Data Form - Module 1 (Grantee Survey) - Check Before You Submit Document

### New Version

PUBLICATIONS -DATA WAREHOUSE PERFORMANCE **MEASURES** 

**GRANTEE** RESOURCES

**IMPORTANT** LINKS

WHAT'S NEW?

DASHBOARD

LOG IN

#### **Important Links**

LIHEAP Glossary Site Feedback

This section of the LIHEAP Performance Management website contains links to other important online resources related to LIHEAP.

Federal LIHEAP Websites ➤

LIHEAP Statute and Regulations ➤

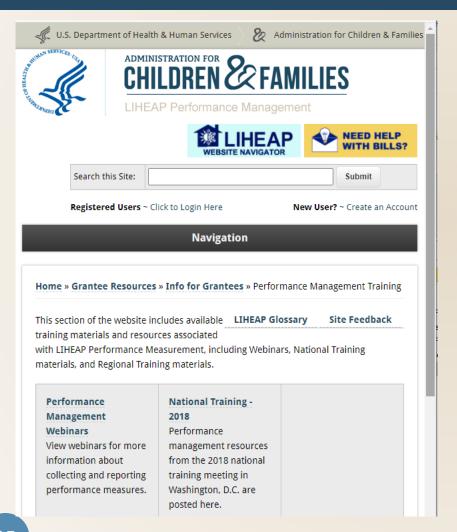
HHS Policy Guidance ∨

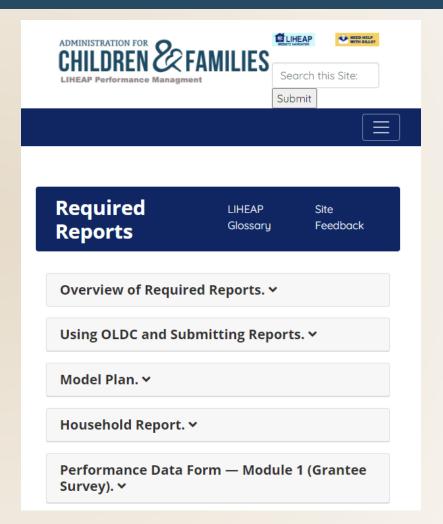
Tools to Find LIHEAP Information ∨

LIHEAP Contact Information >

Other Resources and LIHEAP Stakeholders >

## Screen Size Adjustment Old Website New Website





# Update #2: Redesigned "Grantee Resources"

#### Why Changes were Needed

- The "Grantee Resources" section of the website included many different subpages.
- Content was organized in varying ways (sometimes by type of resource, sometimes by topic). Resources for specific reports were not grouped together and could be challenging to locate.
- Older resources were still in place when newer resources were available.
- Resources that may be applicable to multiple topics could be difficult to find.

### What has Changed?

- 1. The PMIWG proposed a new approach to organize content based on grantee needs / uses and reduce the number of pages.
- 2. Reporting resources are now organized by report.
- 3. New or current resources are predominant.
- 4. Key resources that are applicable to multiple categories are included in multiple locations to make them easy to find.

## Update #2: Redesigned "Grantee Resources"

#### **Grantee Resources**

LIHEAP Glossary Site Feedback

This section of the LIHEAP Performance Management website contains materials and tools designed to help LIHEAP program administrators to effectively implement LIHEAP Performance Management in the design and implementation of their programs.

Required Reports - Access resources to help you with the LIHEAP reports.

Data Accuracy and Reliability - Resources to ensure your data represents your program accurately. >

Using Data for Performance Management - How to use data for program decision-making. ➤

Talking about LIHEAP Data - View resources to present information about your program. ➤

PMIWG - Learn about the Performance Management Implementation Work Group. >

Performance Management Training Resources — Find Past Training Webinars and Tools ➤

# Update #3: Section Layout and Availability

### Why Changes were Needed

- The website included two sections that were restricted and only accessible to grantee users who were logged-in.
  - "Performance Measures" Provided resources and information on Performance Measures data, including access to each state's Executive Summary and Snapshots summarizing results.
  - "Dashboard" Provided information on grantee performance measures reporting capabilities.

### What has Changed?

- 1. To promote data access and transparency, the "Performance Measures" section and the "Dashboard" section are no longer restricted and are now publicly available.
- 2. The sections on the website navigation menu (blue bar) have been reordered to reflect this and to make navigating the website easier.

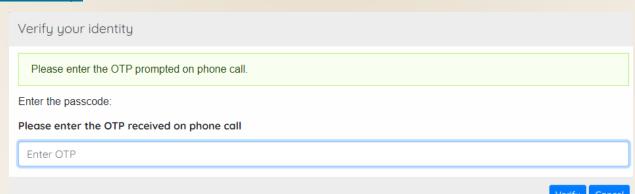
# Update #4: Two-Factor Authentication for Logging In

#### Why Changes were Needed

- The website previously required registered users to log-in by typing their username and password.
- To improve security, HHS identified a need to add an additional procedure to ensure that requests to log in are separately authenticated.

#### What has Changed?

- 1. Recently, two-factor authentication was added to the LIHEAP PMW. All users who attempt to log in to the LIHEAP PMW will be prompted to enter a short one-time numeric code that will be provided by a voice telephone call.
- 2. This change only impacts users who want to log in to the LIHEAP PMW using their credentials to access resources that are not publicly available (see slide 21 for more information).



## **Basic Overview for Using the LIHEAP Performance Management Website**



### Website Organization

- The LIHEAP PMW is organized into the following main sections:
  - Home
  - Publications
  - Data Warehouse
  - Performance Measures
  - Grantee Resources
  - Important Links
  - What's New?
  - Dashboard
  - Help

### Public vs Non-Public Content

- Most information on the LIHEAP PMW is publicly accessible.
- State grantee users with accounts can log in to receive access to two restricted portions of the website (highlighted below).
  - Home
  - Publications
  - Data Warehouse
  - Performance Measures
    - Data Reliability Assessment Tools
  - Grantee Resources
  - Important Links
  - What's New?
  - Dashboard
  - Help
  - Grantee Forum

### **Website Accessibility**

- The LIHEAP PMW is intended to work on all major browsers.
- All content on the LIHEAP PMW is intended to be accessible to people with disabilities and is periodically reviewed for compliance with Section 508 of the Rehabilitation Act.
- If you are looking for assistance with an issue in using the website, the Help page provides FAQs and answers: <a href="https://liheappm.acf.hhs.gov/help">https://liheappm.acf.hhs.gov/help</a>
- Should you encounter any issues with accessing content, please contact webmaster@ncat.org

## Resource and Tools Available for State Grantees



# **Example Grantee Need #1: Eligible Population Data**

 "I have a meeting with management tomorrow, and I need data on how the income-eligible population for LIHEAP has changed in my state in recent years. Where can I get this?"

### **Resources and Tools for Grantees:** #1 - Data Warehouse





My Profile

Search this Site:

Submit



PUBLICATIONS ▼ DATA WAREHOUSE PERFORMANCE MEASURES

GRANTEE RESOURCES

IMPORTANT LINKS WHAT'S NEW?

LOG IN

## Resources and Tools for Grantees: #1 - *Data Warehouse*

Standard Reports

<u>LIHEAP Glossary Reports help Site feedback</u> Report search:

#### **Single State Program Reports**



#### Choose a report:

- Who is income-eligible for assistance
  - S How much funding comes from each source
  - How are funds used
  - Who is assisted
  - Energy Burden
  - LIHEAP Targeting Indexes
  - Service Loss Restoration & Prevention

### Example #2: Performance Measures Information for Other States

 "I have looked at our own performance measures results, but I don't have much context to understand them. I want to know how other similar states are performing and what their results look like. I am busy and just want the main summary information to look at for a few states."

### **Resources and Tools for Grantees:** #2 - Performance Measures Resources





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Search this Site:

Submit

PUBLICATIONS ▼ DATA WAREHOUSE

PERFORMANCE MEASURES

GRANTEE RESOURCES

IMPORTANT LINKS WHAT'S NEW?

HELP

LOG IN

## Resources and Tools for Grantees: #2 - Performance Measures Resources

#### **LIHEAP Performance Measures**

LIHEAP Glossaru Site Feedback

Grantee Profiles — One-page snapshots of state LIHEAP Programs. ➤

What are LIHEAP Performance Measures? — Information on the four LIHEAP Performance Measures.

State Snapshots and Executive Summaries — Resources to help interpret Performance Measures data. ➤

State Performance Measures Executive Summary — One-page explanation of each grantee's Performance Measures results. 

Choose a year:

2019

Choose a State ~

\*The presented data for fiscal years 2016 through 2019 should be considered preliminary pending final data validation.

## Example #3: Help in Checking My Data

 "My performance data this year looks a little different than in the past. I am wondering if there might be an issue, but it's hard to know where to start. Is there anything to help me check or pinpoint any areas to look into?"

### **Resources and Tools for Grantees:** #3 - Data Reliability Assessment Tools

#### **LIHEAP Performance Measures**

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State Snapshots and Executive Summaries — Resources to help interpret Performance Measures data. ➤

Accessing Performance Measures Data through the Data Warehouse — Guidance for using the Data Warehouse. >

#### Data Reliability Assessment Tools >



- Main Heating Expenditures Assessing the reliability of main heating fuel billing data for your LIHEAP-assisted households.
- Electric Baseload Expenditures Assessing the reliability of electric baseload billing data for your LIHEAP-assisted households.

## Example #4: Vendor Agreement Resources

 "My vendor agreements need to be renewed soon. I'd like some guidance on the necessary elements and how to structure these contracts and agreements."

# Resources and Tools for Grantees: #4 – LIHEAP Virtual Library

HOME PUBLICATIONS ▼ DATA WAREHOUSE PERFORMANCE MEASURES GRANTEE RESOURCES IMPORTANT LINKS WHAT'S NEW? DASHBOARD HELP LOG IN

### Welcome to the LIHEAP Performance Management Website

This federal website provides resources, tools, and a dynamic Data Warehouse to help local program administrators, policymakers, and the public access performance management information and performance measurement data for the Low Income Home Energy Assistance Program (LIHEAP).



The LIHEAP Virtual Library



## Example #5: Federal Report Requirements

 "I am new to my position, and I need help understanding the federal reporting requirements and what is needed to complete those reports. Where can I find all the information?"

## Resources and Tools for Grantees: #5 – Required Reports Page

#### **Required Reports**

Standard Form-425. >

LIHEAP Glossary Site Feedback

Overview of Required Reports. > Using OLDC and Submitting Reports. ➤ Model Plan. ∨ Household Report. > Performance Data Form — Module 1 (Grantee Survey). ➤ Performance Data Form — Module 2 (Performance Measures). ➤ Carryover and Re-allotment Report. >

## Example #6: Examples of How to Use My Data

• "I am new. My state has a lot of LIHEAP data, but I am not sure about ways we can effectively use it. Are they any examples to help me?"

# Resources and Tools for Grantees: #6 - Data Case Studies

### Using Data for Performance Management - How to use data for program decision-making. ➤

This section contains examples of how LIHEAP grantees have used Performance Measures data to make program decisions, and lists resources that will be useful to grantees seeking to use their Performance Measures.

#### LIHEAP Data Warehouse

The LIHEAP Data Warehouse allows users to access historic national and state-level LIHEAP data to build instant reports, tables, and charts.



### LIHEAP Data Case Studies

The Data Case Study Project Team of the PMIWG works on developing case studies to highlight examples of how other LIHEAP grantees implemented performance management. Follow the link to see the reports.

### Targeting Energy Assistance to Vulnerable Populations - Youtube

This is a short video about how LIHEAP coordinators can use program data available to them to target outreach.

#### LIHEAP Grantee Search Portal

The Grantee Search Portal is a tool that allows you to identify LIHEAP state grantees that share one or more common characteristics and look up program information for those states.

### Common Program Management and Monitoring Reports: Examples from Grantees

This PDF tool allows you to download and look at real life examples of reports that various state grantees consult on a regular basis to monitor and manage their programs.

# Resources and Tools for Grantees: #6 - Data Case Studies

### **LIHEAP Data Case Studies**

LIHEAP Glossary Site Feedback

The Data Case Studies page allows users to access examples of using data for performance management, prepared by the Performance Management Implementation Work Group (PMIWG). The data case studies include reports and tutorials, webinars, tools, and short videos demonstrating ways grantees have utilized data to examine their programs.

Have a question? Users can also submit feedback or request additional data case studies.

Targeting Vulnerable Households. ➤

Targeting Households with High Energy Burdens. ➤

Using Data for Program Planning and Forecasting. ➤

## Example #7: Finding Other States with Assurance 16 Programs

 "My state is thinking about adding a new Assurance 16 program piece, but we really want to reach out to other states with those programs first. How can I find out who they are without searching state plans and websites?"

# Resources and Tools for Grantees: #7 - Grantee Search Portal

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# Resources and Tools for Grantees: #7 - Grantee Search Portal

### LIHEAP GRANTEE SEARCH PORTAL

LIHEAP Glossar

Reports help

Site feedback

Report search:



The Grantee Search Portal allows you to identify LIHEAP state grantees that share one or more common characteristics and look at program information from those states.

There are three steps to using the tool. First, you will select the information that you want a display as a table. Next, you will select filters to look only at states that match the characteristics that you are interested in. Lastly, you will be able to view the results and download the table.

Perform a Search		
Click on the checkboxes next to the information side-by-side. After you are done, click "Ne		an select more than one to display the information
General Information	Program Components	Eligibility
☐ Contact Information	☐ Cooling Program Description	☐ Crisis Definition
☐ Grantee Profile	☐ Weatherization Program Description	Categorical Eligibility Policies
	Assurance 16 Program Description	☐ Income Threshold (Heating Assistance)
	□ Nominal Benefits (Heat and Eat)	☐ Subsidized Housing Policies
Targeting	Program Administration	Performance Measures
☐ Benefit Matrix	Outreach Practices	☐ Benefit Targeting Index
☐ Heating Assistance Criteria	☐ Percentage of Funds Obligated to	☐ Burden Reduction Targeting Index
☐ Benefit Levels	Weatherization	
	☐ Type of Organization Performing	
	Intake (Heating Assistance)	

## Example #8: Example Reports from Other States

• "We have a new reporting system and want to use it improve our ability to track funds and spending. We have some ideas, but it would be nice to not reinvent the wheel and use some templates from other states. Is there any way to see what other states are doing?

# Resources and Tools for Grantees: #8 - Common Reports PDF Document

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# Resources and Tools for Grantees: #8 - Common Reports PDF Document

Fiscal Controls  Reports used to project and track allocations, spending, payments, and refunds.					
Report Name	Description	Uses	Real-Life Examples		
Contract Detail Report	The Contract Detail Report shows the contract account lines, the remaining balances, all account/budget amendments, the cumulative amount (and frequency) of claims against the contract.	Can be used by Grantee to:  identify those agencies who may be underspending in certain categories  identify agencies who are spending admin faster than program (or vice versa)  Can be used by local office to:  Track spending rate to identify necessary budget change requests	<u>Delaware</u>		
Vendor Payment History	Lists voucher, date, vendor name, Vendor Access Number, amount, unpaid amount, paid amount, and check number, as well as total invoices, open invoices, and paid invoices. Grid format; easy export to Excel.	Can be used by Grantee to:  Monitor and follow-up on unpaid invoices to vendors  Identify those vendors with significantly higher number of invoices/payments than in previous years (vendor monitoring)  Identify "top" vendors for Performance Measure reporting  Track original source of refunds.	Rhode Island		

## Example #9: Question for my peers

• "I want to know more about how other states are collecting delivered fuel data. Tips from other would be really helpful. Is there a way I could ask my peers about this?

## **Resources and Tools for Grantees:** #9 - Grantee Forum





Mu Profile

Search this Site:

Submit



HOME PUBLICATIONS ▼

DATA WAREHOUSE

PERFORMANCE **MEASURES** 

GRANTEE RESOURCES

**IMPORTANT** LINKS

WHAT'S NEW?

DASHBOARD HELP PMIWG

GRANTEE **FORUM** 

LOG OUT

# Resources and Tools for Grantees: #9 - *Grantee Forum*

· Add new Forum topic

Forum	Topics	Posts	Last post
General Discussion	0	0	n/a
LIHEAP Tips  Share tips to help other LIHEAP Coordinators and staff with performance management.	1	1	By cletran 2 months ago
Performance Management Topics Tell us how you use Performance Management resources and what can be improved.	4	4	By Minnesota_WG 2 months ago
General LIHEAP Questions Ask general LIHEAP questions and get feedback from colleagues.	0	0	n/a
Information Sharing Want to show off your latest report, procedure, or system? Post information here for others to see and appreciate.	1	3	By JONESH 3 years 9 months ago

## **Summary & Reminders**



### Summary

- The LIHEAP Performance Management Website was recently updated to provide improvements to website organization, visual display, usability, and security.
- The LIHEAP PMW provides <u>public</u> access to...
  - LIHEAP state-level data from FY 2001 to the most recent available data.
  - LIHEAP Performance Management resources and tools.
  - LIHEAP performance measures indicators.
- The LIHEAP PMW provides restricted access for state grantees to...
  - A Grantee Forum (moderated)
  - Data Reliability Assessment Tools (confidential)
- State grantee staff without an account are encouraged to request an account so that they can log in to access the restricted pages:

https://liheappm.acf.hhs.gov/user/register

Presenter(s): Dan Bausch

### Reminders

- The LIHEAP Performance Management Website is located here: <a href="https://liheappm.acf.hhs.gov/">https://liheappm.acf.hhs.gov/</a>
- If you need assistance using the website or locating a resource, please contact APPRISE and your OCS liaison.
- If you have feedback or recommendations for the website, please send them to APPRISE and your OCS liaison.
- APPRISE Team
  - Daniel Bausch, <u>Daniel-Bausch@appriseinc.org</u>; 609-252-9050
  - Connor Priest, <u>Connor-Priest@appriseinc.org</u>; 609-252-0035
  - Melissa Torgerson (Verve Associates); Melissa@verveassociates.net

### **Audience Feedback**

QUICKPOLL

•

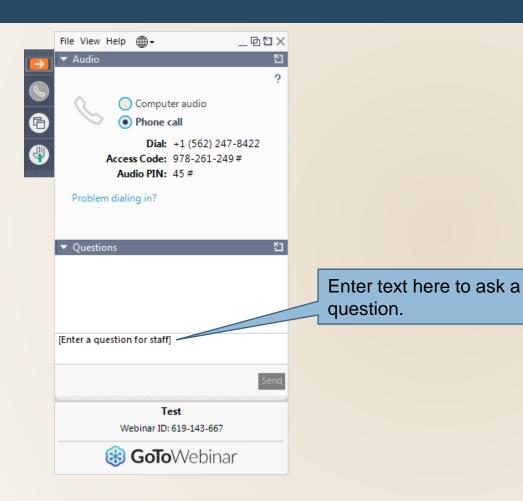
How likely is it that you or your staff will use any of the LIHEAP Performance Management Website tools or resources reviewed today in the next 6 months?

Select all that apply:

- Very Likely
- Somewhat Likely
- Neither Likely or Unlikely
- Somewhat Unlikely
- Very Unlikely

Presenter(s):
Dan Bausch

### **GoToWebinar Question Box**



If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.

